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MEMORANDUM

TO: Governor Stan Stephens
Superintendent Nancy Keenan

FROM: Marvin Kildahl, Chairperson *MK*
Montana State Adult Literacy Council

SUBJECT: Report and Recommendations on Adult Literacy

DATE: September 1, 1989

The Montana State Adult Literacy Council was created by Executive Order No. 16-88 signed on December 9, 1988 by former Governor Schwinden. The official name of the group, according to that executive order, was "The Adult Literacy Coordinating Advisory Council," also known as "The Joint Public Instruction/Governor's Office Task Force on Adult Literacy." Governor Stan Stephens reiterated support for the work of the Council in his letter of April 24, 1989 as did Superintendent Nancy Keenan in her letter of February 28, 1989.

The purpose of this council was stated as follows:

The Council shall, in conjunction with the Office of Public Instruction and various public and private agencies, determine the need for adult literacy services and develop coordinated strategies to reduce the incidence of adult illiteracy in Montana.

Specifically the Council was given the following charges:

- a. gather data in order to determine the extent of the adult illiteracy problem in Montana and the population segments to be targeted;
- b. determine the social, cultural and economic costs of illiteracy in Montana;
- c. define what constitutes adult literacy in Montana, specifically to identify a literacy goal stated in measurable terms;

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- d. coordinate the various statewide literacy efforts, in part by developing an information and referral network;
- e. expand public awareness of the need for and sources of adult literacy assistance; and
- f. recommend policies and initiatives to marshal the state's resources to address unserved citizens needing adult literacy assistance.

The Council was to present its recommendations to the Governor and to the Superintendent of Public Instruction by September 1, 1989.

The attached report and recommendations are presented in fulfillment of these charges. In addition, copies of the reports produced by the Council's three working committees are appended to this report, as is a copy of a letter from the LVA - Flathead County program.

All of the Council members hope that the information contained in these documents can and will be used in order to address the problem of illiteracy in Montana in order to make our state a better place in which to live and work. Please let me know if there are any questions which I may answer concerning this report. And thank you for the opportunity to serve the needs of all Montana's citizens.

ILLITERACY IN MONTANA

**A REPORT WITH RECOMMENDATIONS TO
GOVERNOR STAN STEPHENS**

**AND TO SUPERINTENDENT OF PUBLIC INSTRUCTION
NANCY KEENAN**

**PRESENTED BY THE
MONTANA STATE ADULT LITERACY COUNCIL**

MARVIN KILDAHL, CHAIRPERSON

August 31, 1989



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ILLITERACY IN MONTANA

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INTRODUCTION

The problem of illiteracy is one that is not going away in America, although we all wish it were. Illiteracy impacts our country's ability to compete as a world economic power. Several disturbing trends have been noted, in the United States, including a shrinking pool of workers for business and industry to draw from, and an unacceptably high dropout rate for high school students. Add to these trends the ever-increasing sophistication of today's society and workplace, and the mix spells trouble.

Over the last decade many major corporations have had to establish their own in-house educational components. These companies have done so to provide in-service training for their employees unable to adapt to the changing workplace. But even more disturbing is the need felt by large numbers of companies to provide programs teaching basic reading, language and mathematical skills. With the pool of workers shrinking as the baby boom "bulge" moves out of the employment picture, companies are struggling to hire workers with skill levels needed to handle changing jobs. The number of skilled workers to draw from is shrinking as the overall worker pool diminishes and as the relative number of those workers with fewer job skills and experiences grows. Thus we hear of corporations "dummying down" jobs, i.e., simplifying instructions by, for example, having pictures instead of prices on cash registers, in order to lower the reading or comprehension levels needed to perform a task.

But "dummying down" of jobs and other such ploys are at best short-term solutions to such problems. For they deal only with the symptoms of the problems, not with the cures.

What, then, are the cures for these problems? Each state, and Montana is no exception, must take the responsibility for addressing what has become a national crisis. What the Council has proposed in this report is at least a starting point in seeking some of the cures to this lack of basic skills. We have not attempted to place blame, for that would be wasted effort. What we have tried to do is study the situation in Montana and offer the beginnings of a solution. It is only through a concerted effort that the current situation can be changed. Businesses, educators, politicians, state agencies, libraries, social welfare groups, tribal governments, the news media, literacy volunteers, and citizens as a whole, will all need to see that this is not someone else's problem -- it is our problem.

DEFINITION

One of the first tasks of the Montana State Adult Literacy Council was to agree upon a definition of literacy, specifically one which would be most meaningful in Montana. Definitions of literacy abound. These vary from reading at a certain grade level, to

functioning at any given level. However, the definition of literacy must be in the context of our state rather than one which is imposed by outside studies, if it is to be a functional definition.

After much discussion, the Council developed the following definition of literacy:

TO BE LITERATE IS TO POSSESS AND TO USE SKILLS SUCH AS READING WITH COMPREHENSION, WRITING, SPEAKING AND LISTENING, AND MATHEMATICAL COMPUTING WHICH ENABLE INDIVIDUALS TO SOLVE PROBLEMS, TO MEET THEIR OWN OBJECTIVES AND TO FUNCTION EFFECTIVELY IN THEIR ENVIRONMENTS.

It may have been easier to accept a simpler definition such as, "Reads at the fifth grade level or higher." However, it was the Council's goal to establish a definition that reflects the fact that the ideal level of literacy is a function of societal, as well as of individual goals, aspirations and expectations.

Once the Council had settled on this definition, its work progressed with the formation of three committees which were established to respond to the charges the Council had been given. These three committees -- Data Collection, Costs of Illiteracy, and Information and Referral -- each conducted research into these areas and presented reports and recommendations for the consideration of the Council as a whole.

THE RECOMMENDATIONS

As the Council's discussions proceeded, the problems of illiteracy for the individual and for the state fell into three general categories of need:

1. The need to enhance Montana's business climate by assuring a literate work force.
2. The need to increase or maintain the individual's chances for success in today's economic and social environment.
3. The need for increased literacy services in order to reduce societal and governmental burdens.

The recommendations presented by the council are an attempt to offer solutions to meet these needs.

I. The Need to Enhance Montana's Business Climate by Assuring a Literate Work Force

RECOMMENDATIONS AND RATIONALE:

- Conduct a study of the costs of illiteracy in the workplace in terms of lost time, injuries, training costs, and so forth.

Such a study, sponsored by state government, would indicate to the business community that Montana is concerned about the effects of illiteracy in the workplace, particularly as it affects productivity. This could be especially meaningful for smaller businesses which cannot afford such programs themselves.

- Provide incentives to increase the persistence to graduation rate of Montana's high school students so that by the year 2000, the state's current dropout rate of 13% will be significantly reduced.

Graduation from high school is not necessarily a guarantee that literacy skills will be present. However, persistence to graduation is one of the few measures we possess which will tend to guarantee that at least basic level skills will be present. A dropout rate of 13% in a state which is considered fairly well educated is unacceptable and sends a poor signal to the business community and for any businesses considering locating in Montana. In a society becoming increasingly more sophisticated, the high school diploma is the minimum level of education required of our citizens.

- Prepare an employer awareness packet for statewide distribution in order to let employers know about the value of a literate work force, the costs of illiteracy, and sources of assistance.

This also will send a signal to the business community that Montana is committed to the improvement of the workforce. It would contain suggested positive actions that employers can take to support workers who want to improve their basic skills. This in turn will help the businesses by improving the skill level of the workforce itself, resulting in greater flexibility when changes in requisite job skills occur. It is likely that certain businesses in Montana would contribute to this statewide effort.

- Establish a framework, such as a statewide literacy foundation, to seek and channel private sector funding to literacy programs.

A number of states have established such foundations, usually beginning with grants from private companies. Such funds can often be used to leverage additional funding which will allow an increased number of illiterate citizens to receive services. A matching amount of state funding might also help to finance literacy programs in a more broad-based fashion.

II. The Need to Increase or Maintain the Individual's Chances for Success in Today's Economic and Social Environment

RECOMMENDATIONS AND RATIONALE:

- Target Native Americans on reservations as a group to be better served by literacy programs and providers.

According to 1980 Census figures, these are 17,412 Native Americans 16 years of age and older who are not enrolled in school and who are not high school graduates. Of this number only 1,415 are being served by literacy programs. The need for more services is evident.

- Establish a central clearinghouse in order to coordinate the ongoing collection of literacy data from pertinent agencies and providers, and to disseminate these data to appropriate organizations.

Montana needs to maintain current information on literacy data from agencies and providers in order to deal with this issue. The Council found it very difficult to obtain current information, especially concerning the number of illiterate citizens. Such information is vital for planning purposes.

- Make state services accessible to literacy providers for testing for learning disabilities.

A large percentage of functionally illiterate persons are learning disabled. Both literacy providers, and illiterate individuals themselves are frustrated in their efforts if they do not realize that a learning disability is also a factor in the learning-to-read process. (See letter from LVA-Flathead County attached in Appendix D.)

- Increase the opportunities for adult learners to use current technology in their literacy skill development.

Given the magnitude of the problem, technology may indeed help address it. For example, companies might purchase basic skills packages for their workers in order to increase their literacy levels. Libraries and schools might provide such technology as part of their programs for independent adult learners.

- Establish a toll-free telephone number through the office of the Adult Education Specialist in the Office of Public Instruction in order to provide individuals with up-to-date information about literacy and literacy programs within the state.

There must be an ongoing presence in the state, that is, one place where an individual can call to obtain information on literacy. Many people who are illiterate are secretive about it because they are embarrassed. They are unlikely to be persistent in finding such programs. There needs to be easy and quick response to queries for help.

- Produce a series of 30 and 60-second audio and video public service announcements to develop awareness and to promote the need for a highly literate population.

Not only those who are illiterate, but those who are dealing with illiterate people, whether in the home, agency or business, need to be made aware of what services are available. This must be an ongoing effort in order to reach Montana's citizens.

- Develop a literacy information packet for distribution, to tie literacy efforts in Montana to the International Year of Literacy (1990).

Montana has an opportunity to "piggyback" on the International Year of Literacy which will undoubtedly receive wide media coverage. The state can accomplish more with less in addressing this problem if it can concentrate resources for this effort.

- Design a Montana-oriented literacy logo which will be positive and readily recognizable, for use with all literacy programs in the state.

As part of Montana's literacy effort, an easily recognizable logo can focus our efforts. Any school, business, agency, or library program can use this logo and be assured that its program will be recognized as a part of Montana's statewide effort to address the problem of illiteracy.

III. The Need for Increased Literacy Services in Order to Reduce Societal and Governmental Burdens

RECOMMENDATIONS AND RATIONALE:

- Target recipients of funding and services under the Family Support Act and Project Work Program, to receive literacy programs and services.

Poverty status is a major predictability factor for people needing literacy improvement. Citizens receiving funding under the Family Support Act and Project Work tend to be at greater risk than nonrecipients. The Council found that of the total number of recipients on income maintenance (12,745), only 1,432 are currently receiving literacy services.

- Target inmates of Montana's men's and women's prisons to receive literacy programs and services.

Approximately 1,060 male inmates reside in the state prison in Deer Lodge; 56 female inmates are housed at the correctional facility in Warm Springs. Of the male inmates, 576 tested below the 10.0 grade level on the Stanford Achievement Test. In February 1989, 185 of these inmates were in regular adult basic education, 36 in cell study, and 53 in college study. Literacy efforts for female inmates were minimal. The great majority of these inmates will return to society after serving their terms. They represent, to a great degree, a drain on the state's resources, not just while incarcerated, but after release, because so many of them lack basic skills needed to gain meaningful employment. The state must seek long-term solutions to this dilemma if it is to remedy this problem.

- Develop intergenerational literacy programs so parents and their children will be taught literacy skills together; add an advocacy component for education for children.

Intergenerational literacy programming recognizes that in many cases there is a cycle of dependency which moves from generation to generation. By offering literacy training to families, this cycle has a better chance of being broken. The unfortunate fact is that parents who cannot read "model" this same characteristic to their children. Certainly literacy is not the only problem where such dependency occurs, but it is often an important aspect of an individual's feelings of self-worth, and of that person's ability to obtain and hold employment.

ADDITIONAL RECOMMENDATION:

The final recommendation is to reauthorize the Adult Literacy Council to allow it to continue its work. The presence of such a statewide group sanctioned by the state's chief executive officer and by the head of the Office of Public Instruction will provide a means of both assuring and monitoring Montana's efforts to eliminate illiteracy. The Council as it is currently constituted, stands ready to carry out this new charge.

CONCLUSION

There is much to be said about the need for additional literacy programs in Montana. This report and the recommendations from the Montana State Adult Literacy Council have attempted to focus on efforts that can be successful and that will yield the greatest return on the investment in the long run.

But there is another, less tangible return on any investment that we make, and that is the effect on the quality of life in Montana. Quality of life is widely perceived as one of Montana's most positive images, but it must be worked at. It doesn't just happen. In addition, it is something that is made up of the improvement in individual lives. This is true of literacy as well, from the person who will lose a job if he or she cannot read directions on a new piece of equipment, to the grandparent who wants to be able to read a story to a grandchild.

Illiteracy carries with it a cost too dear for Montana to pay. The American Library Association estimates that nationwide, functionally illiterate adults cost \$224 billion annually in welfare payments, crime, job incompetence, lost taxes, and remedial education. Whether illiteracy is perceived as a lost revenues issue, or as a quality of life issue, it should be a public policy issue. The Council hopes that the State of Montana will recognize the magnitude of the illiteracy problem and its effect on so many aspects of the welfare of its citizens. It is from such recognition, and from consequent activities, that Montana's quality of life is available to all, and all its citizens are given the opportunity to realize their full potentials.

APPENDIX A

DATA COLLECTION COMMITTEE REPORT

August 1, 1989

DATA COLLECTION COMMITTEE REPORT

I. Montana Literacy Status

A. Formal Education and Literacy Needs of General Population

1. Census

Using the 1980 Census information, Montana had a population of 786,690. Of these, 130,802 people may need literacy improvement. The census information is shown below:

Montana 1980 Census

Number

Persons 16-19 years, not enrolled in school, not high school graduates	6,556
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Persons 20 years and over, not high school graduates	<u>124,246</u>
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Total 130,802

The 130,802 total figure will probably increase because an estimated 20% of the students who begin high school (9th grade) will not graduate, and projected figures of state population show an increase.

2. Literacy Providers

The following table indicates the number of people whose literacy needs are being served. Note that the total number served may be a duplicate count. For example, a person in Project Challenge may also have received services from one of the ABE centers.

Literacy ProvidersNumber Served

(Note: These providers
represent a continuum of a range
of abilities, grade levels, and
modes of instruction)

Adult Basic Education Centers (23 centers)	(1988)	5,793
Project Work Program (12 counties)	(1988)	225
Project Val (3/31/89) (12 sites)		490
Homeless Adult Program-Billings	(1989)	17
Project Challenge (statewide)	(1988)	111
Great Falls Vo-Tech Center	(1988)	67
Missoula Vo-Tech Center	(1988)	29
MT Native American Comm. Colleges (7 comm. colleges-2 have ABE programs)		560
Library Literacy Program (4 centers)		180
Rural Employment Opportunity Ag Worker Literacy Program (statewide)	(1989)	<u>20</u>
	Total	7,492

The total number of those people in Montana who may need literacy improvement (130,802) minus those people who are being served by some literacy provider (7,472) is 123,330. The need to serve more is evident.

3. Literacy Test

The United States Department of Education, Office of Deputy Under Secretary for Planning, Budget and Evaluation determined adult illiteracy rates of states by comparison of the 1982 English Language Proficiency Survey with the 1980 Census. The survey included a 26-item written test. The literacy test cutoff of 20 was selected as providing the best discrimination to determine the illiterate. The survey indicated that Montana had an 8 percent illiteracy rate. In 1980, Montana had 524,836 adults over age 20. This population number times the illiteracy rate would mean that Montana had 41,987 persons who were classified as illiterate based on a sample of direct testing. This same study used statistical methods for predicting factors in literacy. In Montana, 83 percent of the predictability was based on the number of years of schooling. Other predictability factors

included race, poverty status, age, nativity, recency of immigration (for non-natives), and reported non-English-speaking people.

B. Specific Target Populations and Literacy Needs

1. Native American on Reservations

Since formal education is a high predictor of people who may need literacy improvement, this parameter was reviewed. One major area showing a below-average formal educational level were Native Americans on reservations. The percent of high school graduates on the seven reservations among persons 25 years old and over range from 33.3 percent (Rocky Boy) to 58.1 percent (Flathead). Native Americans make up 4.7% of the state population: 36,974. Of this number, 23,529 live on reservations.

- a. The following table presents more information according to the 1980 census, on the literacy status of Native Americans on the seven reservations.

<u>Native Americans</u>	<u>Number</u>
Persons 16-19 years, not enrolled in school, not high school graduates	6,317
Persons 25 years old and over, not high school graduates	<u>11,095</u>
Total	17,412

(Data for each reservation is available.)

- b. The following table indicates the number of Native Americans being served by literacy providers. The number served may be a duplicate count; some may be served by both providers.

<u>Literacy Providers</u>	<u>Number</u>
Native Am. College's Remedial Programs	560
Adult Basic Education Centers	<u>855</u>
Total	1,415

The total number of those Native Americans on the reservations who may need literacy improvement (17,412) minus those people who are being served by some literacy provider (1,415) is 15,997. The need to serve more is evident.

2. Poverty Status

Another major predictability factor for people needing literacy improvement is poverty status. Those people who are recipients of the Family Support Act and Project Work program (income maintenance) are at a greater risk than those who are not recipients. According to the 1987 Montana Research and Analysis of the Department of Labor and Industry, 224,538 people between the ages of 16 and 64 were economically disadvantaged.

The following table presents additional information on poverty status.

<u>Economically Disadvantaged</u>	<u>Number</u>
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Persons 16-64 years	224,538
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Income Maintenance

Recipients (14,256) times average
household size (2.71) is 38,622

33% not high school graduates	12,745
-------------------------------	--------

# Recipients served by ABE in 1987	1,432
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The total number of recipients on income maintenance who may need literacy improvement (12,745) minus those recipients served by Adult Basic Education programs (1,432) is 11,313. The need to serve more is evident.

3. Montana State Prison

Another area showing a below average formal educational level is in the Montana State Prison. According to the Montana Department of Institutions, there were 1,060 male inmates on March 20, 1989. Of this number, 576 inmates tested below the 10.0 grade level on the Standard Achievement Test. In February 1989, Montana State Prison had 185 inmates in regular adult basic education, 36 in cell study, and 53

in college study. There were 56 female prisoners in 1989 at the Women's Correctional Facility in Warm Springs. Literacy efforts are minimal for the women inmates.

The number of inmates testing below the 10.0 grade level (576) minus the total number in ABE study programs (221) is 355. The need to serve each individual is critical not only to each of the inmates but also to society.

II. Summary and Recommendations

- A. The Data Collection Committee recognizes that the entire foregoing data is limited to people who are obviously in need of literacy improvement and does not include the many people whose skills are not adequate for the increasing technological demands in the work place.
- B. The Data Collection Committee recommends that the target populations to be better served by literacy providers are Native Americans on reservations, recipients of the Family Support Act and Project Work Program, and inmates of the Montana State Prison. Plans for the implementation of this project which will serve these target populations need to be created.

C. The Data Collection Committee also recommends that a central clearing house be established in order to coordinate the future collection of literacy data from pertinent agencies and providers as well as to disseminate the data to those affected organizations.

APPENDIX B

COMMITTEE ON COSTS OF ILLITERACY REPORT

COMMITTEE ON COSTS OF ILLITERACY

FINDINGS AND RECOMMENDATIONS

I. CHARGE TO THE COMMITTEE

On December 9, 1988, the Governor signed Executive Order No. 16-88 establishing the Montana State Adult Literacy Council. To meet the charges stated in the Order, three committees were established. The Committee on Costs of Illiteracy was assigned to determine the social, cultural and economic costs of illiteracy in Montana.

II. COMMITTEE'S PROCEDURES

The committee's strategy for meeting its charge was to provide preliminary evidence of social, cultural and economic problems faced by Montana that can be linked to illiteracy as defined by the Council as a whole. The committee recognized that, because of lack of time and research capability, an in-depth documentation of actual costs and extensive surveying of the business community were impossible. The Committee agreed that its most valuable function would be to begin to develop a body of evidence suggesting the scope and severity of the problem. It would accomplish this by analyzing data gathered to date, and by surveying two highly targeted populations: (1) adults currently receiving literacy tutoring, and (2) state leaders in business, education and government services.

III. FINDINGS

- A. Data Analysis--A review of literacy data for Montana from state and national sources has produced a generalized picture of literacy, but this picture is based primarily on years of school completed or grade-level reading achievement. Much of the information is based on estimates using predictive factors. Not only have we found a wide variation in estimates of our illiterate population, we have also found evidence that contradicts the relatively high literacy ranking for this state. For example, our ACT ranking in 1987 was fourth place nationwide, but nearly 60 percent of our civilian population age 16 to 19, who are not high school graduates and who are not enrolled in school, are unemployed or not in the labor force. Statewide estimates also fail to reflect a concentration of the problem within demographic and socio-economic groupings. For example, according to the 1980 census, 74.4 percent of all Montanans age 25 and over are high school graduates, but for Native Americans living on the seven reservations, the range is only 33.3 percent to 58.1 percent.

As for the number of adults needing and receiving literacy services, the estimates vary enormously. Based on the National English Language Proficiency Survey, Montana has approximately 32,240 illiterate adults (8 percent of the adult population), of which 10 percent, or 3,224, are receiving services. But, based on the 1980 census, at least 130,802 adults are "adult education eligible." In 1988, nine separate literacy organizations reported a total 7,472 adults served. About 85 percent of that total, or 6,351, would be an unduplicated count, or .05 percent adults receiving literacy services. Therefore, estimates of numbers of adult illiterates range from 32,240 to 130,802, with the percent served by remedial programs ranging from .05 percent to 10 percent.

The 1990-93 Montana Adult Education Plan reveals further data not reflected in national estimates. Areas showing a below average formal education level were the Indian reservations and the Montana State Prison. On the Fort Peck Indian Reservation, the dropout rate is nearly 50 percent. At Montana State Prison, more than half the inmates scored below grade 10 on the Stanford Achievement Test. Other findings include the following trends:

- Of the 5,793 adults served in 1988 by ABE programs, 2,990 were unemployed going into the program and only 352 got a job upon program completion (down 54.7 percent from 1985).
- ABE program completers are not getting an external high school diploma. Only 18 of the 5,793 did so, 88.8 percent fewer than in 1985. The number of external diploma teachers and schools have decreased, accounting in part for the drop. However, the GED pass rate for ABE participants is also the lowest in four years.
- The pass rate for all individuals taking the GED test is 77.5 percent, lower than the national average.

Even a cursory review of census reports, adult education data, and personal testimonials, correlates low levels of literacy with social and economic problems such as incarceration, chronic unemployment and poverty. In 1988, 1,588 (27.4 percent) of the ABE participants were receiving public assistance, a 48.8 percent increase over 1985. One hundred seventy-seven were removed from public assistance upon program completion. The 1980 census shows a positive correlation of mean income with years of school completed. The mean income of males with 0 to 7 years of schooling was \$12,771. For American Indian males, the mean income was only \$1,060. (The mean for women in both groups was significantly lower than for males.)

In 1989, 9.17 percent of Montana families were at or below poverty level, but the range was 4.84 percent (Jefferson County) to 27.66 percent (Prairie County). In January 1989, Montana's seasonally adjusted unemployment rate was 6.2 percent (U.S. was 5.4 percent), but the range was 1.3 percent to 15 percent.

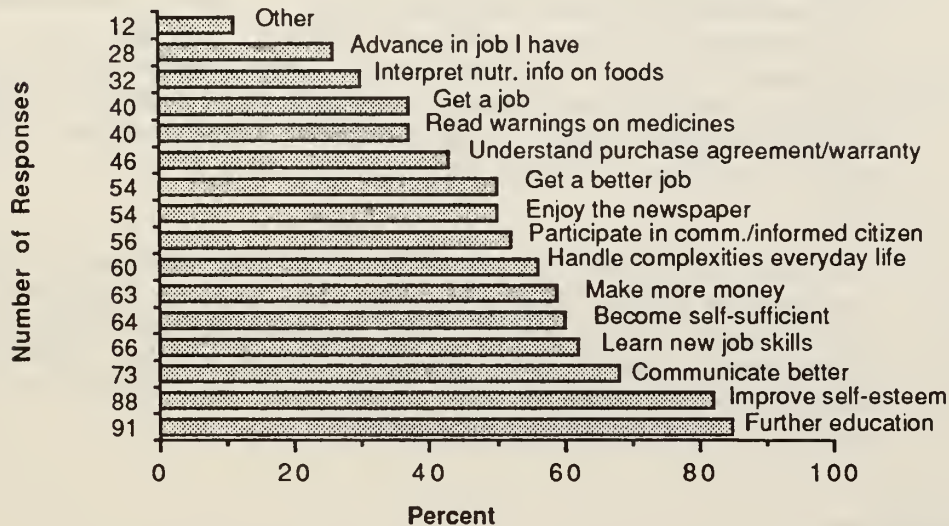
Conclusion--If the economic picture in Montana is alarming, particularly in certain geographic areas and among certain population types, then it must be assumed that low levels of literacy associated with these problems are alarming as well.¹ Test scores and grade-level equivalence are only part of the measure of literacy. The ability of an individual to function effectively in society, while more difficult to quantify, is a more reliable indicator of literacy. For this reason, the Committee wanted to supplement statistical data with personal perceptions from those seeking literacy tutoring, and from state leaders knowledgeable about the effectiveness of defined populations both in and outside the workforce. (See III B below.)

¹See "Multiple Disadvantages of the Functionally Illiterate" attached as Appendix C.

B. Summary of Survey Findings

1. Tutor/student survey. In May 1989, a survey was sent to 130 adult literacy students with an 82 percent return. The first question asked students what they would not be able to do without their current literacy training. The top answers were "go on to further education" and "improve my self-esteem." The results are graphically represented below.

Adult Literacy Questionnaire Results



In answer to the second question, respondents used their own words to describe the single most important benefit derived from their literacy program. Answers fell into the following general groups:

1. Further education (39)
2. Basic skills (38)
3. Self-esteem (20)
4. Job (9)
5. Communicate better (5)
6. Self-sufficiency (3)

For representative comments in each group, refer to Appendix A.

2. State Leader Testimony. Members of the Costs Committee conducted telephone interviews of individuals around the state who were most likely to have informed opinions about the extent of functional illiteracy among their clients or constituents. Appendix B paraphrases the comments of the director or chief representative of the following:

1. Butte-Silver Bow Government
2. Attorney General
3. Project Challenge (literacy program for displaced workers)
4. Private Industry Council
5. Summer Youth Employment Program
6. Office of Public Instruction
7. IBM Corporation

8. Idaho Pole Company
9. Mountain View School for Girls
10. Pine Hills School for Boys
11. Montana State Prison
12. County Welfare
13. Tribal Community Colleges

Nearly all those interviewed identified a portion of their clients as having literacy problems. Several attributed the inability to find or upgrade employment to functional illiteracy. Directors of programs for the economically disadvantaged drew a strong correlation between socio-economic problems and poor literacy. On the other hand, while the county welfare representatives acknowledge up to 20 percent illiteracy among their clients, they feel that Social and Rehabilitation Services enables people to survive with minimal skills. "These people survive just fine. If help was offered, most of them would not accept it."

The three representatives of tribal community college all feel the need for more adult basic education than they are now receiving. There are 1,100 Native Americans on the reservation, according to Blackfeet Community College's Mike Hill, who cannot obtain a GED because they lack the basic reading skills. These people are locked into the welfare system or they are manual laborers.

IV. CONCLUSIONS

Between 32,240 and 130,802 Montana adults are "eligible" for literacy services. That is, their formal schooling is less than 12 years of high school. Between .05 percent and 10 percent are receiving literacy services. Where literacy services exist, students benefit greatly, and report improvement in their self-esteem. However, many are not going on to further education and many unemployed are not finding work. Representatives of the state's social, economic and employment services confirm that low levels of literacy are generally accompanied by other disadvantages, most notably economic dependence and criminality.

Questions posed to the Council by this Committee include:

1. Is 8 percent an acceptable rate of illiteracy for Montana?
2. Is the number of individuals eligible for literacy services unacceptably high?
3. Is 10 percent receiving literacy services sufficient?
4. Is the level of illiteracy among prison inmates acceptable?
5. Is the mean income for individuals with lower than normal formal schooling unacceptably low?
6. Is it acceptable to have areas of exceptionally high unemployment, where the unemployment is in part attributable to low levels of literacy?
7. Is low self-esteem enough of a problem to warrant additional literacy services?

V. APPENDICES

- A. Survey Results. See attached.

- B. Individual Testimonial Statements. See attached.
- C. Multiple Disadvantages of the Functionally Illiterate. See attached.

APPENDIX A

ADULT LITERACY QUESTIONNAIRE

In May 1989, the members of the Costs Committee of the Montana Adult Literacy Council formulated and distributed an Adult Literacy Questionnaire to students in literacy programs around the state. The students completed the questionnaires, often with the help of their tutors.

Number of questionnaires distributed: 130
Number of questionnaires returned: 107 (82%)

PART A. WITHOUT THE OPPORTUNITY TO PARTICIPATE IN THIS EDUCATIONAL PROGRAM, I WOULD NOT BE ABLE TO (CHECK ALL THAT APPLY):

These are the results in descending order:

85% (91)	Go on to further education
82% (88)	Improve my self-esteem
68% (73)	Communicate better with others
62% (66)	Learn new job skills
60% (64)	Become self-sufficient
59% (63)	Make more money
56% (60)	Handle the complexities of everyday life
52% (56)	Participate in the community as an informed citizen
50% (54)	Enjoy the newspaper
50% (54)	Get a better job than the one I have
43% (46)	Understand a purchase agreement or product warranty
37% (40)	Read warnings on medicines
37% (40)	Get a job
30% (32)	Interpret nutritional information on packaged foods
26% (28)	Advance in the job I have
11% (12)	Other

Some examples:

"Make out checks."
"Read signs on the streets."
"I can learn the way of the American thought."
"Help my children with their studies."

PART B. THE SINGLE MOST IMPORTANT BENEFIT I EXPECT TO GET FROM THIS PROGRAM IS:

The responses fell into six broad categories: further education, learn basic skills, gain self-esteem, communicate better with others, get a better job, and gain self-sufficiency. Many people listed more than one benefit of the literacy program. The following are the number of times each category is mentioned along with three unedited representative comments.

- Further education (39):
- "The opportunity to better my education and give myself a better status in life as well as the community."
 - "To get my Ged an advance on to college. Without this program, people like me would never have a chance in the education department."
 - "New friends and a better understanding of life and to have my GED so I can go on to bigger and better things in my life."
- Basic skills (38):
- "I am a slow reader, Bad seller and my math sill are very bad. I am a beleaver that this school is making a difrance with out it i would not sand a chance."
 - "To be able to read and write and write checks, buy groceries and be a better person."
 - "To be able to write properly and spell, To be able to figure out problems. And to be able to help my son with his home work. I thank God for this place."
- Self-esteem (20):
- "It will help achieve a goal that I have wanted for along time and make me feel better about myself."
 - "To be treated as a person instead of a 'low-life'."
 - "To feel better about myself and no that I am not stupid and I can learn and improve on what I don't no."
- Job (9):
- "To further my education in order to get a good job."
 - "The opening on schools and jobs I can get with my G.E.D. Since I was neglected academically in high school. Thanks to this program I have another chance."
 - "I want to get a job and be able to be on my own."
- Communicate better (5):
- "I want to speak English fruently and correctly. I want to understand everything that other people talk about. Also I want to interpret everything that I have thought and felt perfectly."
 - "Communicate better with others."

"I am learning to read much better, and spelling better, and communicate with people. I have a good teacher."

Self-sufficiency (3):

"Learn to be more self sufficient. The need to be independent and prove to the world I can make it has become really important."

"I can take care of myself."

"Become self sufficient and better self esteem of my self."

APPENDIX B

ADULT LITERACY TESTIMONY

DON PEOPLES, Chief Executive Officer of Butte-Silver Bow government, sees evidence of below-average literacy skills, particularly among the unemployed and recipients of general assistance. Butte has approximately 450 on the welfare rolls, most of them single adults unable to find a job, partially because of inadequate literacy skills. He sees job application forms so poorly filled out that the applicant can't hope to get even the lowest-level positions. Mr. Peoples sees a great need for adult literacy services in the Butte area. Since unemployment and general assistance are unusually high here, the need for literacy assistance is also unusually pronounced.

Attorney General MARC RACICOT comes into contact with many dysfunctional families. Low levels of literacy are typically associated with economic disadvantages, high crime rates and substance abuse. He doesn't know the full extent of the problem, but feels it is serious enough to be considered a real problem for Montana. Although he doesn't want to pinpoint the Indian reservations, he does recognize that any economically depressed area has a higher incidence of crime, illiteracy and other social ills.

Mr. Racicot said that our population in general needs better literacy skills to keep up with current demands. Judging from young lawyers' difficulty with writing and communicating, Mr. Racicot concludes that literacy in general has declined over the last 20 years, even among the supposedly well-educated.

RICK DEADY, Private Industry Council (PIC) staff person at the Montana Department of Labor, reports that an assessment of reading ability precedes all JTPA employment training programs for adults and youth. Since this population is economically disadvantaged, it is characterized by lower than normal functional literacy. Although these programs refer for remediation those reading below the seventh grade level, Mr. Deady cautions against using grade level as the only indicator of literacy.

DAVE CRUM runs the literacy program for "Project Challenge" in Helena, one of seven sites statewide. All Project Challenge participants are displaced workers who need help, including basic skills remediation, finding work. Each year about 700 individuals are tested. Between 20 and 25 percent tested are functioning below the eighth grade level in reading, language or math. Last year there were 125 people in the remedial program. The program tries to concentrate on areas of greatest need. For example, Champion Mill in Libby has sought assistance for their workers who are not able to work with upgraded machinery and processes. Mr. Crum states that 20-25 percent of these workers can't move up because of functional illiteracy. Seven hundred workers at the Libby mill site need skills upgrading. In general, Mr. Crum feels there are many displaced workers who need literacy assistance but don't perceive themselves as needing it.

LINDA GRIEF is the director of a tri-county Summer Youth Employment Program operated out of the Helena Rocky Mountain Development Council. SYEP is one of the federally funded employment training programs that require literacy assessment and

remediation. The age group is 14 through 21, so some of the participants are young adults, and some are high school dropouts. All are economically disadvantaged. The students taking remediation do advance through one-on-one literacy instruction, but job placement is a serious problem. Most of these disadvantaged young people will never meet the standards set by employers. These employers are not high-tech industries, but average small and large businesses, including farmers and ranchers. They are seeking workers who are bright, who work independently, and who have computer skills. They don't want entry-level people any more. Even high school graduates are having a lot of trouble just filling out a job application. Employers needing auto mechanics are no longer hiring anyone who has not had special training in advanced skills such as understanding metric dimensions. High school vocational education instruction is not usually adequate preparation for this demand. Ms. Grief emphasizes that her comments refer to a strictly defined population which, in addition to its low income status, also suffers from other social problems contributing to low achievement.

NANCY KEENAN, Superintendent of Public Instruction, is concerned about an unnoticed and unattended paradox occurring in Montana day after day. While our ACT/SAT scores rank significantly higher than most states, 59 percent of our civilian population, age 16 to 19, who are not high school graduates, and who are not enrolled in school, are either unemployed or not in the labor force. This latter figure is statistically attributed to the 1980 Census. Although statistics do not point a red arrow to one of the suspected underlying causes, many teachers, counselors and social workers unconditionally agree that functionally illiterate adults are the majority of those who fill this 59 percent category.

DEE KOBER, Educational Marketing Representative for IBM Corp., surveyed a number of IBM field representatives because they have closest contact with businesses in the state. All report serious literacy deficiencies. For example, a lumber company in Missoula is concerned because some employees can't read safety posters. Some are unable to fill out job accident reports. In another report, business managers tried to conduct surveys using printed forms, but so many people were unable to read the forms that the surveyors resorted to oral questioning (a more time-consuming procedure).

An officer from Columbia Falls Aluminum said that, in order to reduce the problem of poorly prepared workers, they have had to insist that job application forms be filled out right at the office. They had found that some applicants took forms home and had someone else fill them out. He feels there is a serious literacy problem in the state and attributes some of it to schools' system of social promotion. He would like to see school/business coalitions. He believes there should be incentives to business to help address the problem statewide.

JOHN BRADY-FINKE, manager of Idaho Pole Company, reports that all employees are high school graduates and says he has encountered no problems due to any employees being unable to read or do enough basic arithmetic to function effectively on the job.

NEAL CHRISTENSEN, principal of Mountain View School for Girls in Helena, says that while some of the girls (about one-fourth) rank in the 40th percentile or below, most are literate enough to be able to comprehend and fill out forms. He says that motivation to learn and achieve is a bigger problem than illiteracy.

ALAN DAVIS, Superintendent of the Pine Hills School for Boys in Miles City, said that in their population of 160 boys, perhaps 20 percent could be said to be poor enough in literacy skills that they have trouble functioning effectively, but that few have really serious defects.

BILL WENDLAND, Educational Officer at Montana State Prison in Deer Lodge, reported that 205 of the prison population of 1,075 (19 percent) are taking some academic education at the prison. Of those 205, 88 inmates (42.9 percent) are involved in remedial reading and special education mathematics classes. MSP considers anyone functioning below sixth grade level as being functionally illiterate. At present, there are 94 inmates whose test scores placed them below the sixth grade level (8.7 percent of the prison population). It is obvious that literacy is a much greater problem among the prison population than it is among the non-prison population.

SUSAN SMITH, Director of Lincoln County Welfare, says that illiteracy appears to be a problem in approximately 20 percent of the clients. Most of these have a least some capacity to read and write. Social and Rehabilitation Services (SRS) enables people to survive with minimal skills. These people survive just fine. If help was offered most of them wouldn't accept it. Dependence on General Assistance, more so than on Aid to Families with Dependent Children, is very generational--parents hand their attitudes down to their children and it is hard to break the cycle. Children need to be taught when they are very young that basic skills are necessary.

J.T. BROWNLEE of Roosevelt County Welfare says that only a few clients can't fill out the SRS application. Illiteracy isn't a big problem in his county, at least among the young people. Many of the Native American young people were sent to boarding schools where they learned basic skills. Also, nearly every child attends Head Start and learns basic skills, so that any generational illiteracy problems are being intercepted.

GARY HUFFMASTER, Director of Yellowstone County Welfare, says that illiteracy is not a major problem. Some people have comprehension problems. The adults in the Aid to Families with Dependent Children program are transitional, often displaced homemakers who need assistance until they can get on their feet. These people don't lack basic skills. Of the General Assistance population, many are in the gray area - not developmentally disabled enough to qualify for Supplemental Security Income (SSI), yet not intelligent enough to hold a job. These people have low intellectual capabilities and low academic achievement. Their problems are not simply lack of motivation or of basic skills, but a lack of self-esteem, along with other problems. If they can see a need to acquire more skills they will. Yellowstone County Welfare works hand-in-hand with the Billings ABE Center in helping anyone who shows a desire for more education.

JANINE WINDY BOY-PEASE reported that Little Big Horn Community College does not have a literacy program at this time and they have not studied the literacy rate on the reservation. They hope to start with an adult basic education program in the future. Even though Hardin provides a program, Native Americans from the reservations do not attend.

MIKE HILL, who directs Blackfeet Community College Adult Education and Adult Basic Education, stated that there are 1,100 Native Americans on the reservation who cannot obtain a GED because they lack the basic reading skills. Jobs are highly competitive. People who do not have the basic skills are locked into the welfare system or they are manual laborers. To get off welfare, their salary has to be greater than the minimum wage because they lack the basic benefits of subsidized rent, child care, food stamps and energy assistance. The college lost its adult education funding from the BIA.

According to **PEGGY NAGEL**, Stone Child Community College in Box Elder, without trained tribal council members with competent trained staff, it is difficult to apply for and receive funds that are available for assistance and potential economic development. The people on the reservation desire to learn and improve themselves through education. It takes time to acquire the GED because many of the Native Americans cannot afford transportation and child care. The State of Montana does not provide sufficient funds for the adult basic education program being provided through the school district. The appropriation is so small it becomes a waste of time and money. Many Native Americans are denied public assistance benefits because they either cannot read about them or cannot understand the meaning of the benefits when the material is read to them. Peggy believes the new accreditation standards will help improve the quality of students coming out of the school system.

APPENDIX C
MULTIPLE DISADVANTAGES OF THE FUNCTIONALLY
ILLITERATE

"PEOPLE WHO LACK BASIC OR FUNCTIONAL LITERACY SKILLS ARE SURPRISINGLY LARGE IN NUMBER AND ALSO SUFFER FROM OTHER MAJOR SOCIAL AND ECONOMIC DISADVANTAGES"

Hunter and Harman, Adult Literacy in the United States, 1979.

POVERTY

"Nearly 50% of young adults with 12 or fewer years of schooling who had NAEP reading scores in the bottom quartile of the distribution were members of poor or nearly poor households."

National Assessment of Educational Progress (NAEP)
Young Adult Literacy Assessment, 1986.

"Families at or below the poverty level are 5 times more likely to be functionally illiterate than families with an income of \$15,000 or above."

Business Council for Effective Literacy, 9/84

UNEMPLOYMENT

"Both women and men with more proficient literacy skills achieved superior employment records, avoided prolonged unemployment more frequently, and earned higher hourly wages than their counterparts with weaker literacy skills."

NAEP Young Adult Literacy Assessment, 1986.

"Illiterate adults comprise almost 75% of the ranks of the unemployed." Literacy Facts

In Montana, 59% of the civilian population age 16 to 19 who are not high school graduates, and who are not enrolled in school, are either unemployed or not in the labor force.

1980 Census

INCARCERATION

Fifty percent of prisoners nationwide are functionally illiterate at a cost of 6 billion dollars annually (Bell, 1986).

85% of all juveniles appearing in the courts are functionally illiterate. Literacy Facts

"It costs some \$14,000 a year to keep a prisoner in jail; 62% of all prison inmates are high school dropouts."

Fortune, November 7, 1988

PUBLIC ASSISTANCE

One out of three mothers receiving Aid to Families with Dependent Children are classified as illiterate.

U.S. Department of Education, 1982

"Welfare families drain the government of an average \$4,300 a year; dropouts head more than half of them."

Fortune, November 7, 1988

RACIAL OR ETHNIC
MINORITY

"54% of Native Americans are functionally Illiterate."
Time, April, 1986.

On Montana's Crow Reservation, 77% of the Native American population speak a language other than English at home.
1980 Census

WOMEN

In 1981, among female heads of households who did not have a high school diploma, 75% were living in poverty vs. 34% of male heads of households with equivalent educational attainment. 23% of adult females are illiterate vs. 17% of adult males.

Literacy Facts

LOST POTENTIAL

"Literacy Volunteers of America estimates the loss of \$237 billion per year in unrealized earning forfeited by those who lack basic learning skills."

U.S. News, 1982.

THE AMERICAN LIBRARY ASSOCIATION CLAIMS THAT FUNCTIONALLY ILLITERATE ADULTS COST \$224 BILLION ANNUALLY IN WELFARE PAYMENTS, CRIME, JOB INCOMPETENCY, LOST TAXES, AND REMEDIAL EDUCATION.

Distributed by the Office of Public Instruction

July 1989

APPENDIX C

INFORMATION AND REFERRAL COMMITTEE REPORT

PROPOSED RECOMMENDATIONS FROM THE INFORMATION AND REFERRAL SUB-COMMITTEE:

1. Public Service Announcements:

That a series of 30 and 60 second audio and video public service announcements be developed which would be used throughout the state for the purpose of developing awareness and promoting the need to have a highly literate population in Montana.

a. That the MTN network in Butte and Great Falls be contacted to determine if they would sponsor the production of the PSAs and assist in getting them aired throughout the state.

b. That the PSAs feature learners, tutors and well-known personalities including men and women, various age groups and minorities.

c. That the scripts for the PSAs be developed with input from individuals with knowledge and experience in literacy and providing literacy services.

2. Employer Awareness Packet

That an employer awareness packet be developed providing employers throughout the state information about the value of having a literate work force and suggesting positive actions that they can take to support workers who want to improve their basic skills.

a. That when appropriate, various private sector associations (such as Montana Bankers Association) be contacted to see about the feasibility of making presentations at their annual meetings.

3. Toll Free Number and Directory of Information

That a toll free number be established through the office of the Adult Education Specialist at OPI for the purpose of providing individuals with up-to-date information about literacy and literacy programs within the state.

a. That the directory of information regarding literacy and literacy programs be computerized and updated at least three (3) times per year.

b. That U.S. West Communications be contacted to determine what help they might be in establishing the toll free number.

c. That Retired Senior Volunteers be contacted about the potential to staff the telephone line.

4. Literacy Information Packet

That a packet of information on literacy be produced and distributed which would tie literacy efforts in Montana to the International Year of Literacy (1990) and be available for literacy awareness week in Montana.

a. These packets should contain information on the following:

- newsreleases
- visual/clip art to be used in media information
- statistics on literacy/illiteracy in Montana
- the need for a literate population
- what actions a local community can take
- what groups to involve at the community level
- how to use the packet/purposes
- where to get help and additional information
(state, regional and national resources)
- sample proclamation
- list of existing Montana programs and services

b. That a private sector source (printing businesses etc.) be contact to assist with the printing of the packets.

APPENDIX D

PUBLIC COMMENT



LITERACY VOLUNTEERS of AMERICA in FLATHEAD COUNTY

FLATHEAD COUNTY LIBRARY

247 1st. Ave. EAST

KALISPELL, MONTANA 59901

406/ 756-5687

NANCE J. CRAFT

3.6.89

To: Literacy Task Force

RE: Testing for LD students

Greetings from Flathead County:

The one area that is lacking in this and many literacy organizations is testing for learning disabled students. According to United Way figures, between 10 to 30% of our functionally illiterate population has some form of learning disability. I believe the number rests in the higher end of 10 to 30% in our program. I have spoken to the head of the LD program at Flathead Valley Community College about testing these students. Short of writing a grant to fund this project, we have few alternatives - except one. Since there is already testing for learning disabilities going on as a component of Vocational Rehabilitation, it would seem most prudent to expand the existing facilities rather than pioneering new agencies. At this time, Voc-Rehab is closed to us and to the college. This testing component is open only to those who have job related problems and referrals from professional agencies. This, of course, was the purpose in creating this component, but today the need extends past the original conception.

As the literacy task force, I implore you to consider this issue and possible extension of Voc-Rehab services. Literacy is surely a timely and critical issue to our communities, our work force, and our state. Human potential is at stake. A large percentage of the functionally illiterate are learning disabled, so it stands to reason that the issue of learning disabled citizens is critical, also.

Literacy Volunteers of America in Flathead County commends you again for your time and efforts toward finding solutions to this most pressing problem. If our organization can contribute in any way (statistics, general information, or special projects), please let us know. We will be eagerly awaiting news of your discussion of this issue.

Thank you for your valuable time,

Nance J. Craft, Coordinator LVA-FC

LVA-BITTERROOT
306 STATE STREET
HAMILTON MT 59840
FEBRUARY 23, 1988

TO: Adult Literacy Co-ordinating Advisory Council
FROM: Council and tutors, LVA-Bitterroot

Dear Council Members:

The tutors and council members of the Bitterroot Public Library's Literacy Program welcome you to the effort to expand and promote adult literacy in Montana. Executive Order 16-88 is official recognition of a problem which has often been overlooked or denied. It is heartening to know that able and qualified people such as yourselves will join to strengthen our society as a whole, by liberating individuals from the terrible bondage of being a non-reader in a world that still largely depends on understanding the written word. We'd like to take this opportunity to offer some comments and ideas in the hope that our experience will be of value.

The first three items of the PURPOSE section of the executive order (a, b, & c) concern themselves with gathering data and defining the scope of illiteracy in Montana. The "Whereas" section of the order does a good job of stating the extent and hazards of illiteracy in Montana and our nation. More information will help describe the problem and move Montanans and our legislators to action, but we can't suspend or delay our task while data is gathered. Let's get on the job now!

There are five volunteer literacy programs associated with libraries in our state and 12 VAL projects, some of which are connected to ABE or Vo-Techs. These volunteer programs operate with minimal funds and resources but they have been able to train tutors and in turn, the tutors have helped many people improve their reading skills and enrich their lives.

These programs need and deserve your immediate help. Executive Order 16-88 charges you to develop an information and referral network among the various statewide literacy efforts. We want to see such a network established between these various groups. Funds to sponsor travel and meeting expenses for periodic gatherings of these providers (at least twice a year) at which ideas and experiences can be exchanged are a high priority. Continuation of the statewide literacy newsletter is important. Much of the training and recruiting material available to literacy programs was developed in environments very different from ours, and this industrial-area, big-city oriented material is often not relevant to our own more rural experience. We need money to produce materials more pertinent to Montana, for ourselves.

Some of the people who come to us for help with reading appear to have learning disabilities. We need official access to the state agencies who do testing. This will enable us to refer people to these resources who can then test our prospective students and help us determine if there is a disability and how it can best be treated. This is extremely important. People may have a powerful desire to read but if they also have an underlying and unidentified disability, they are likely to encounter disappointment and failure.

We would like to recommend a statewide advertising campaign featuring Montanans who have overcome reading problems, talking about what being able to read better means to them. National ad campaigns seem to rely heavily on celebrities and sophisticated scripts. We feel that Montanans talking in plain straightforward language can best reach and motivate other Montanans. Such a message from the governor's office would be very effective.

Thank you for the time and effort you are putting forth to help solve this important problem.

APPENDIX E

**MEMBERS AND STAFF
OF THE ADULT LITERACY COUNCIL**

STATE ADULT LITERACY COUNCIL

Ann Bartell
Chapter One Reading Program
Great Falls, MT

Senator Chet Blaylock
Montana Senate
Helena, MT

Jan Drayer
Gallatin Valley Literacy Council
Bozeman, MT

Bob Hand
Flathead Valley Community College
Kalispell, MT

Mike Hill
Blackfeet Community College
Browning, MT

Marvin Kildahl
REACH for Literacy
Great Falls, MT

Dee Kober
IBM, Inc
Helena, MT

Laurie Lamson
Department of Labor and Industry
Helena, MT

Bill Lannan
University System
Helena, MT

Robert Lind
Extension Services
Bozeman, MT

Rita Martens
Community Ed - Forsyth Schools
Forsyth, MT

Richard Miller
Montana State Library
Helena, MT

Claudette Morton
Board of Public Education
Helena, MT

Rep. Richard Nelson
Montana House
Helena, MT

Rhandi Rachlis
Montana Low Income Coalition
Basin, MT

Carl Visser
Human Resource Development Council
Billings, MT

(See Adult Literacy Council staff
list on back)

COALITION STAFF

Patty Berg-Rogers
Rural Employment Opportunities
Helena, MT

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Helena, MT

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